DOCUMENT RESUME

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TITLE	Business and Office Managerial Series. Duty Task List.
INSTITUTION	Oklahoma State Dept. of Vocational and Technical Education, Stillwater. Curriculum and Instructional Materials Center.
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IDENTIFIERS	*Administrative Assistants

ABSTRACT

This document contains the occupational duty/task lists for three occupations in the business and office managerial series. Each occupation is divided into seven duties. A separate page for each duty in the occupation lists the tasks in that duty along with its code number and columns to indicate whether that particular duty has been taught and to provide space for comments. The occupations are office manager, administrative assistant, and secretary office manager. A progress chart is provided for tracking individualized instruction. The occupational duty/task lists are the result of an extensive two-step development process in which information on current occupational requirements was gathered from such sources as consortia, trade associations, and current curriculum materials and was then synthesized by industry representatives, vocational instructors, and state-level representatives. (YLB)

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DUTY TASK LIST

OFFICE MANAGER
ADMINISTRATIVE ASSISTANT
SECRETARY OFFICE MANAGER

CE051514

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Office of Educational Research and Improvement
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OKLAHOMA OCCUPATIONAL TESTING CENTER

OKLAHOMA OCCUPATIONAL TESTING CENTER

INTRODUCTION:

Today's vocational instructors and administrators are faced with a myriad of important questions. They are searching for methods of providing accountability for students' acquisition of knowledge and skills as related to a constantly changing job market.

The Oklahoma Occupational Testing Center is in the business of eliminating some of the guesswork in answering today's tough questions. The professional staff, using a thorough and valid methodology, has developed duty/task lists for over 150 occupations in vocational education. Additional occupational duty/task lists will be made available as development is completed. These duty/task lists will help answer the following questions:

- Are students being prepared for today's jobs?
- What should today's vocational instructors be teaching?
- Is the curriculum addressing industry needs and is it up-to-date?
- How can vocational programs be improved?
- What in-service programs are needed for instructors?

BACKGROUND:

The occupational duty/task lists are the result of an extensive development process. Information regarding the occupational skills needed for employment is gathered from a number of sources such as consortia, trade associations, and current curriculum materials. This information is then synthesized by: 1) industry representatives, 2) vocational instructors, and 3) state level vocational representatives. The end result is a listing of occupations and the specific duties and tasks within each occupation. After dissemination for field review a committee of industry and vocational representatives revise the duty/task list to its final form.

USES:

The Oklahoma Occupational Testing Center's Duty/Task Lists are designed to be of value to a vocational program in several ways:

- Improving program planning
- Documenting industrial standards
- Evaluating curriculum and instruction
- Tracking individualized instruction*
- Using as a discussion tool with advisory committees
- Developing up-to-date job descriptions
- Performing self-evaluations
- Performing administrative program evaluations

INFORMATION:

To find out more about the Oklahoma Occupational Testing Center, call toll free:
1-800-654-4502.
Ask for our free catalog, listing over 150 occupations for which duty/task lists are available. CIMC curriculum materials related to these lists may also be available.

*A Progress Chart is provided for tracking individualized instruction.

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Oklahoma Occupational Testing Center

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veteran status, or qualified handicap.

88-005972

PROGRESS CHART

OKLAHOMA OCCUPATIONAL TESTING CENTER

Program

Oklahoma State Department of Vocational and Technical Education

Date

Student Name	Duty/Task Code 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	
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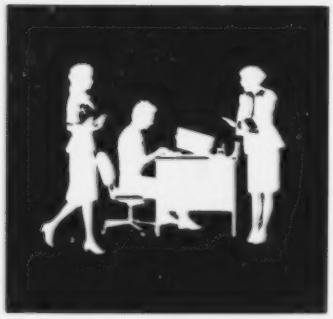
Accuracy Code

* 0 = No exposure - no information nor practice provided during training program, complete training required.
1 = Exposure only - general information provided with no practice time; close supervision needed and additional training required.
2 = Limited practice - has practiced during training program, additional training is required to develop skill.
3 = Moderately skilled - has performed independently during training program; limited additional training may be required.
4 = Skilled - can perform independently with no supervision.

This chart may be duplicated as needed.

DUTY/TASK LISTS

BUSINESS AND OFFICE MANAGERIAL SERIES



OCCUPATIONS:

1. Office Manager
2. Administrative Assistant
3. Secretary Office Manager

OKLAHOMA OCCUPATIONAL TESTING CENTER

DUTY/TASK LIST

BUSINESS AND OFFICE MANAGERIAL SERIES

OCCUPATION 1: OFFICE MANAGER

DUTIES:

A. Communicate with Co-Workers and Others

B. Prepare Error-Free Documents

C. Maintain Office Records

D. Process Mail and Shipments

E. Reproduce Documents

G. Perform Accounting and Calculating Functions

H. Use Information Processing Equipment and Ten-Key Calculator

OKLAHOMA OCCUPATIONAL TESTING CENTER

OCCUPATION: **OFFICE MANAGER**

DUTY: **Communicate with Co-Workers and Others**

CODE	TASK	TAUGHT	COMMENTS
A.01	Use telephone correctly		
A.02	Take and distribute telephone messages		
A.03	Use telephone directory		
A.04	Use appropriate words, grammar, sentence construction, and punctuation in written or verbal communications with customers, co-workers, and supervisors		
A.05	Interpret, analyze, and confirm verbal or written instructions or procedures		
A.06	Operate communications equipment		
A.07	Interpret work schedules and personal communications		

OCCUPATION: **OFFICE MANAGER**

DUTY: **Prepare Error-Free Documents**

CODE	TASK	TAUGHT	COMMENTS
B.01	Type error-free letters		
B.02	Type error-free memos and inter-office communications		
B.03	Type error-free itineraries		
B.04	Type error-free electronic mail messages		
B.05	Type and produce error-free requisition forms, invoices, and other forms		
B.06	Type error-free financial statements		
B.07	Proofread copy to produce error-free documents		
B.11	Make out error-free checks and receipts		
B.12	Use dictionary and/or other reference materials to produce error-free documents		
B.13	Demonstrate proper correction technique as well as operating procedures for the typewriter		

OCCUPATION: **OFFICE MANAGER**

DUTY: **Maintain Office Records**

CODE	TASK	TAUGHT	COMMENTS
C.01	File and retrieve records alphabetically		
C.02	File and retrieve records numerically		
C.03	File and retrieve records geographically		
C.04	File and retrieve records by subject		
C.05	Use appropriate filing terms and practices		

OCCUPATION: **OFFICE MANAGER**

DUTY: **Process Mail and Shipments**

CODE	TASK	TAUGHT	COMMENTS
D.01	Receive and open mail		
D.02	Sort mail		
D.03	Distribute mail		
D.04	Prepare bulk mail for distribution		
D.05	Operate postage equipment		
D.06	Process packages for and from various shipping companies		
D.07	Use most cost effective methods of transmittal (note classes of mail and shipping alternatives)		
D.08	Use post office rules, schedules, and procedures to post mail		

OCCUPATION: **OFFICE MANAGER**

DUTY: **Reproduce Documents**

CODE	TASK	TAUGHT	COMMENTS
E.01	Photocopy documents		
E.02	Use carbons to produce legible copies		
E.04	Collate reproductions		

OCCUPATION: **OFFICE MANAGER**

DUTY: **Perform Accounting and Calculating Functions**

CODE	TASK	TAUGHT	COMMENTS
G.05	Keep bank records and reconcile bank statements		
G.06	Figure time cards		
G.07	Prepare sales tax and payroll tax reports		
G.08	Establish and maintain petty cash fund		
G.14	Perform routine banking procedures		
G.15	Compute and maintain payroll records		

OCCUPATION: **OFFICE MANAGER**

DUTY: **Use Information Processing Equipment and Ten-Key Calculator**

CODE	TASK	TAUGHT	COMMENTS
H.04	Use a ten-key calculator		

DUTY/TASK LIST

BUSINESS AND OFFICE MANAGERIAL SERIES

OCCUPATION 2: ADMINISTRATIVE ASSISTANT

DUTIES:

A. Communicate with Co-Workers and Others

B. Prepare Error-Free Documents

C. Maintain Office Records

D. Process Mail and Shipments

E. Reproduce Documents

G. Perform Accounting and Calculating Functions

H. Use Information Processing Equipment and Ten-Key Calculator

OKLAHOMA OCCUPATIONAL TESTING CENTER

OCCUPATION: **ADMINISTRATIVE ASSISTANT**

DUTY: **Communicate with Co-Workers and Others**

CODE	TASK	TAUGHT	COMMENTS
A.01	Use telephone correctly		
A.02	Take and distribute telephone messages		
A.03	Use telephone directory		
A.04	Use appropriate words, grammar, sentence construction, and punctuation in written or verbal communications with customers, co-workers, and supervisors		
A.05	Interpret, analyze, and confirm verbal or written instructions or procedures		
A.06	Operate communications equipment		
A.07	Interpret work schedules and personal communications		
A.08	Screen job applicants and utilize job descriptions		

OCCUPATION: **ADMINISTRATIVE ASSISTANT**

DUTY: **Prepare Error-Free Documents**

CODE	TASK	TAUGHT	COMMENTS
B.01	Type error-free letters		
B.02	Type error-free memos and inter-office communications		
B.03	Type error-free itineraries		
B.04	Type error-free electronic mail messages		
B.06	Type error-free financial statements		
B.07	Proofread copy to produce error-free documents		
B.10	Type and/or produce error-free telegrams, telexes, etc.		
B.12	Use dictionary and/or other reference materials to produce error-free documents		
B.13	Demonstrate proper correction technique as well as operating procedures for the typewriter		

OCCUPATION: **ADMINISTRATIVE ASSISTANT**

DUTY: **Maintain Office Records**

CODE	TASK	TAUGHT	COMMENTS
C.01	File and retrieve records alphabetically		
C.02	File and retrieve records numerically		
C.03	File and retrieve records geographically		
C.04	File and retrieve records by subject		
C.05	Use appropriate filing terms and practices		

OCCUPATION: ADMINISTRATIVE ASSISTANT

DUTY: Process Mail and Shipments

CODE	TASK	TAUGHT	COMMENTS
D.01	Receive and open mail		
D.02	Sort mail		
D.03	Distribute mail		
D.04	Prepare bulk mail for distribution		

OCCUPATION: **ADMINISTRATIVE ASSISTANT**

DUTY: **Reproduce Documents**

CODE	TASK	TAUGHT	COMMENTS
E.01	Photocopy documents		
E.04	Collate reproductions		

OCCUPATION: **ADMINISTRATIVE ASSISTANT**

DUTY: **Perform Accounting and Calculating Functions**

CODE	TASK	TAUGHT	COMMENTS
G.04	Compile financial statements		
G.09	Calculate depreciation		
G.11	Compute interest and interpret loan information		
G.12	Interpret accounting tables, graphs, and charts		

OCCUPATION: **ADMINISTRATIVE ASSISTANT**

DUTY: **Use Information Processing Equipment and Ten-Key Calculator**

CODE	TASK	TAUGHT	COMMENTS
H.01	Use information processing terminology		
H.02	Use information processing software		
H.03	Use information processing equipment for data processing		
H.04	Use a ten-key calculator		

DUTY/TASK LIST

BUSINESS AND OFFICE MANAGERIAL SERIES

OCCUPATION 3: SECRETARY OFFICE MANAGER

DUTIES:

A. Communicate with Co-Workers and Others

B. Prepare Error-Free Documents

C. Maintain Office Records

D. Process Mail and Shipments

E. Reproduce Documents

G. Perform Accounting and Calculating Functions

H. Use Information Processing Equipment and Ten-Key Calculator

OKLAHOMA OCCUPATIONAL TESTING CENTER

OCCUPATION: SECRETARY OFFICE MANAGER

DUTY: Communicate with Co-Workers and Others

CODE	TASK	TAUGHT	COMMENTS
A.01	Use telephone correctly		
A.02	Take and distribute telephone messages		
A.03	Use telephone directory		
A.04	Use appropriate words, grammar, sentence construction, and punctuation in written or verbal communications with customers, co-workers, and supervisors		
A.05	Interpret, analyze, and confirm verbal or written instructions or procedures		
A.06	Operate communications equipment		
A.07	Interpret work schedules and personal communications		

OCCUPATION: **SECRETARY OFFICE MANAGER**

DUTY: **Prepare Error-Free Documents**

CODE	TASK	TAUGHT	COMMENTS
B.01	Type error-free letters		
B.02	Type error-free memos and inter-office communications		
B.03	Type error-free itineraries		
B.04	Type error-free electronic mail messages		
B.07	Proofread copy to produce error-free documents		
B.08	Type error-free tables		
B.09	Type error-free reports and manuscripts		
B.10	Type and/or produce error-free telegrams, telexes, etc.		
B.11	Make out error-free checks and receipts		
B.12	Use dictionary and/or other reference materials to produce error-free documents		
B.13	Demonstrate proper correction technique as well as operating procedures for the typewriter		

OCCUPATION: **SECRETARY OFFICE MANAGER**

DUTY: **Maintain Office Records**

CODE	TASK	TAUGHT	COMMENTS
C.01	File and retrieve records alphabetically		
C.02	File and retrieve records numerically		
C.03	File and retrieve records geographically		
C.04	File and retrieve records by subject		
C.05	Use appropriate filing terms and practices		

OCCUPATION: **SECRETARY OFFICE MANAGER**

DUTY: **Process Mail and Shipments**

CODE	TASK	TAUGHT	COMMENTS
D.01	Receive and open mail		
D.02	Sort mail		
D.03	Distribute mail		

OCCUPATION: **SECRETARY OFFICE MANAGER**

DUTY: **Reproduce Documents**

CODE	TASK	TAUGHT	COMMENTS
E.01	Photocopy documents		
E.02	Use carbons to produce legible copies		
E.04	Collate reproductions		

OCCUPATION: SECRETARY OFFICE MANAGER

DUTY: Perform Accounting and Calculating Functions

CODE	TASK	TAUGHT	COMMENTS
G.05	Keep bank records and reconcile bank statements		
G.08	Establish and maintain petty cash fund		
G.14	Perform routine banking procedures		

OCCUPATION: SECRETARY OFFICE MANAGER

DUTY: Use Information Processing Equipment and Ten-Key Calculator

CODE	TASK	TAUGHT	COMMENTS
H.04	Use a ten-key calculator		